
Guidance# 1.0 Greenphire ClinCard

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Guidance Topic: Greenphire ClinCard

PURPOSE:

The Purpose of this guideline is to describe the requirements and procedures for the establishment and use of the Greenphire ClinCard. All research studies, programs or projects are required to use the Greenphire ClinCard for payment or reimbursement to research subjects and/or participants.

INTRODUCTION:

The Greenphire ClinCard program has been established to provide an efficient and compliant mechanism for study teams to provide compensation and reimbursements to study subjects participating in Upstate Medical University's IRB approved studies. The ClinCard is a reloadable prepaid card available to research PIs and coordinators to pay human subjects quickly and efficiently. The card offers a faster and safer method of paying study participants and provides a convenient administrative tool for acquiring, loading, tracking, and reporting studies' payments.

BENEFITS:

- Direct, immediate on-site disbursements to study subjects at the completion of a study visit
- Loading protocol is done centrally in Research Accounting
- Reduced payment administration on study coordinators
- Improved workflow
- Enhanced processing/tracking/reporting
- Increased participation retention
- Central accounting and tax reporting support through The Research Foundation for SUNY
- Can be used by a participant on multiple studies

COST:

- \$4.00 per card
- \$1.75 per load fee
- \$2,000 Start Up Fee
- \$500 Annual Fee

CLINCARD ROLES and RESPONSIBILITIES:

The following are ClinCard defined roles. These role names may differ from the functional job titles of the system users.

- **Administrators:** Research Accounting will upload the studies into the ClinCard portal and upload the payment schedules. Upon loading the studies into the portal, Research Accounting will assign studies to the designated Clinical Research Coordinators. By keeping the Administrator permission limited, other users will not be able to edit the study and/or the study budget. Research Accounting also maintains the unassigned inventory of ClinCards.
- **Approvers:** Approvers are designated at the study level to approve payments. We limit this to (2) team members. The team for each study will determine who they want to have Approver access.
- **Research Coordinators:** Research Coordinators will have access to all their designated studies. They will be responsible for registering subjects into the ClinCard system, assigning ClinCards, as well as loading payments for disbursement to the subjects. Prior to registering a subject, they should search the "ALL" study to ensure the subject is not already set up.
- **Report Viewing:** Report viewing is available at the Administrator/University level, or it may be limited to a Study-Specific level. When report viewing is provided at a study level, users will only receive data that pertains to their designated studies; therefore, they will be unable to view reports that includes other study data.

CLINCARD REQUEST

What is required for your study be set up in Greenphire:

1. A detailed Protocol to be used when setting up Greenphire
2. Who will be the main contact for the study and submit the online request?
3. Who will need access to Greenphire, and what kind of access does each person need: Coordinator, Approver, Reports?

We encourage each Department to develop a plan for the approval process for all studies in ClinCard before submitting a study in the online request.

Procedures

1) The main contact for the study submits a request form for ClinCard payments. You will be asked for the following information:

User Information

- Name of Requestor
- Name of Study Coordinator
- Name of Approver
- Name Reports Request Details
- Principal Investigator (PI)
- IRB protocol number
- Study Name
- Number of ClinCards needed (you do not need to order cards for the entire duration of the study: you can replenish cards as the study progresses)
- Subject payment budget
- Duration of study (beginning and end date)
- Payment schedule throughout the study

Please enter the period that your study team plans to process payments for the study, from your first payment to the first patient until the last payment to the last patient. We will never close a study until we confirm with the main contact. To prevent fraud, we want to make sure studies do not stay open longer than necessary, especially if they have money available in their budget.

The Research Foundation for SUNY front-loads the money to pay your subjects. We charge each study/department (using the PTA) via a journal entry each month.

2) At the time of establishment, Research Accounting reviews the ClinCard requirements, distributes the required completion forms to be returned and will then build each protocol into Greenphire providing user access to 2 study team users.

3) Research Accounting will make arrangements to disburse ClinCards and manage the ClinCard inventory. Research Coordinators will receive an email when ClinCards are ready for pick-up. The coordinator will sign an acknowledgment form.

CARD SECURITY AND RECORD KEEPING REQUIREMENTS

Once you pick-up your ClinCards, you are responsible for their safekeeping.

- Keep the ClinCards that have not yet been distributed to subjects/participants in a secure location, such as a locked draw or safe, and limit the number of people who have access to them (one person per study is strongly recommended).
- Maintain a ClinCard log that lists cards picked-up and cards issued.
- Do not photocopy the ClinCards.
- Do not share the ClinCard system log-in information with anyone.

LOST OR STOLEN CARDS

If a participant loses their card or has their card stolen, and they are still an active member of an Upstate Medical University study, they should contact their Study Coordinator immediately. The coordinator will be able to cancel the original card and reissue them a new one. Any funds on the original card that were fraudulently removed/spent cannot be replaced. If the Study Coordinator needs to order a new card from Research Accounting, the study will be charged for the card.

TAX INFORMATION AND YEAR END 1099

Compensation for participating in a study is taxable income. Social Security numbers are required when registering a participant in the ClinCard system. If an individual's cumulative payments are \$600 or more in a calendar year, The Research Foundation on behalf of SUNY is required to issue the participant a Form 1099. The Research Foundation Central Office monitors payment totals.